



Student Last Name	Student First Name
OASIS Student ID (000-000-000)	For Financial Aid Office Use Only

## 2022 - 2023 Verification Worksheet V5 - Independent Students

Your 2022-2023 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called Verification. The Financial Aid Office is required to confirm the information you and your parents reported on your FAFSA by comparing your FAFSA with the information on this worksheet and all other requested documents. If there are differences between your FAFSA and the financial documents provided, a financial aid administrator will make corrections to your FAFSA as needed. *If you have an unusual circumstance where you were granted a filing extension, are a victim of identity theft, or filed a Non-IRS Income Tax Return, please contact the Financial Aid Office before completing this form.*

**To request an IRS Tax Return Transcript and/or a Non-Filing Status Letter,** go to [www.IRS.gov](http://www.IRS.gov) and select the “**Get Your Tax Record**” link or call 1 (800) 829-1040. Make sure to request the “**IRS Tax Return Transcript.**” You can also complete and submit a 4506-T form. In most cases, electronic filers can request a 2020 IRS Tax Return Transcript within 2–3 weeks after the return has been processed by the IRS. Non-electronic filers can request the 2020 IRS Tax Return Transcript within 8-11 weeks after the paper tax return has been processed by the IRS. **Please do not send original documents to CSUMB.**

If you used the Data Retrieval Tool (DRT), the Financial Aid Office may need to confirm that you successfully transferred IRS Income Information. In some cases, an IRS Tax Return Transcript may be required.

### Submit all documents as one packet by mail or in person:

<b>By Mail:</b> CSUMB Financial Aid Office 100 Campus Center Seaside, CA 93955	<b>In Person:</b> CSUMB Financial Aid Office Student Services Building 47 3rd Floor	<b>Questions:</b> Phone: (831) 582-5100 Email: <a href="mailto:financial_aid@csumb.edu">financial_aid@csumb.edu</a> Website: <a href="http://csumb.edu/financialaid">csumb.edu/financialaid</a>
---	--	--

If your documents are complete, please allow 2-3 weeks for processing. During the peak period from March to August, processing may take up to 5 weeks. Completed documents received will be removed from your “To Do” list in OASIS Student Center. If incomplete, notification will be provided to the student via their CSUMB email. Please follow up with all requests in a timely manner.

**Incomplete verification worksheets will not be processed. To ensure timely processing of your documents, we strongly encourage you to submit all documents by the priority document deadline listed on the financial aid website.**

## Part 1: Household Information

List the people in your household, include:

- You and your spouse (required, if married).
- You or spouse's children if the student or spouse will provide more than half of the children's support from July 1, 2022 through June 30, 2023 even if a child does not live with the student.
- Other people if they now live with the student and the student or spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support through June 30, 2023.

Include the name of the college for any household member who is or will be enrolled at least half time in a degree, diploma, or certificate program at postsecondary educational institution between July 1, 2022 and June 30, 2023.

### For household members enrolled at a postsecondary institution:

Relationship to Student	Full Legal Name	Age	Enrolled at least 1/2 Time?	Name of College
Self			<input type="checkbox"/> Yes <input type="checkbox"/> No	CSUMB
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

Student Last Name

Student First Name

OASIS Student ID

## Part 2: Student Information (Check the box that applies and attached required items)

Select if you filed a **Federal Tax Return with the IRS** and successfully transferred your 2020 IRS Federal Tax information onto your FAFSA via the online IRS Data Retrieval Tool.

Select if you filed a **Federal Tax Return with the IRS** and you were unable or chose not to transfer your 2020 IRS Tax Information via the IRS Data Retrieval Tool.

**You must attach a 2020 IRS Tax Return Transcript.**

Select if you filed **AND amended your original 2020 Federal Tax Return with the IRS** and used the Data Retrieval Tool (DRT) on the FAFSA.

**You must attach a signed 2020 IRS Form 1040X with all schedules filed with the IRS.**

Select if you filed **AND amended your original 2020 Federal Tax Return with the IRS** but did NOT use the Data Retrieval Tool (DRT) on the FAFSA.

**You must attach a 2020 IRS Tax Return Transcript and a signed 2020 IRS Form 1040X with all schedules filed with the IRS.**

Select if you **did not file taxes and were NOT required to file taxes** because you were not employed and had no income earned from work during 2020. **A Non-Filing letter from the IRS must be attached.**

Select if you **did not file taxes and were NOT required to file taxes** because you were employed and were not required to file during 2020. List every employer even if the employer did not issue an IRS W-2 form and the amount earned from each employer. **Attach copies of all 2020 W-2's and a Non-Filing Letter from the IRS.**

Employer Name	Amount Earned in 2020	W2 or equivalent provided?
Example: CSUMB	\$2000	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Student Last Name

Student First Name

OASIS Student ID

**Part 4 - (Identity & Statement of Educational Purpose): Read the statement and sign/provide information using ONE option:**

**Option A:** Bring an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport to the CSUMB Financial Aid Office. Sign the Statement of Educational Purpose in the presence of a CSUMB Financial Aid official.

**Option B:** If you are unable to complete the document in person at CSUMB, you may bring an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport to a notary. You must also sign the Statement

**Part 4: Identity and Statement of Educational Purpose (Option A: To Be Signed at CSUMB)**

**Identity and Statement of Educational Purpose to be signed in person at CSUMB**

The student must appear in person at CSUMB to verify thier identity by presenting an unexpired valid government-issued photo identification (ID), such as, but not limited to, a driver's license, other state-issued ID, or passport.

The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and review the student's ID.

In addition, the student must sign, **in the presence of the institutional official**, the Statement of Educational Purpose provided below.

**Statement of Educational Purpose**

I certify that I, \_\_\_\_\_ am the individual signing this Statement of Educational Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending \_\_\_\_\_ for 2022 – 2023.  
Student Name  
Name of Institution



\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student ID Number

**Verificación de Identidad y Declaración de Propósito Educativo Para ser firmada en la CSUMB**

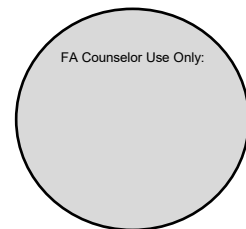
El estudiante debe comparecer en persona en CSUMB para verificar su identidad mediante la presentación de una identificación con fotografía (ID) válida emitida por el gobierno que no haya expirado, como una licencia de conducir, otro tipo de identificación emitida por el estado o pasaporte, entre otros.

La institución conservará una copia de la identificación con fotografía del estudiante en la cual se anotará la fecha en la que se recibió y revisó, y el nombre del funcionario de la institución autorizado a recibir y revisar las identificaciones de los estudiantes.

Además, el estudiante debe firmar, en presencia del funcionario de la institución, la Declaración de Propósito Educativo proporcionada a continuación.

**Declaración de Propósito Educativo**

Certifiqué que yo, \_\_\_\_\_ soy el individuo que firma esta Declaración de Propósito Educativo, y que la ayuda financiera federal estudiantil que yo pueda recibir sólo será utilizada para fines educativos y para pagar el costo de asistir \_\_\_\_\_ a para 2022–2023.  
Imprimir nombre del estudiante  
Imprimir nombre de institución educativa postsecundaria



\_\_\_\_\_  
Firma del estudiante

\_\_\_\_\_  
Fecha

\_\_\_\_\_  
Número de identificación del estudiante

Student Last Name

Student First Name

OASIS Student ID

## Part 4: Identity and Statement of Educational Purpose (Option B: Notary)

### Identity and Statement of Educational Purpose to be signed in the presence of a Notary

If the student is unable to appear in person at CSUMB to verify identity, the student must provide to the institution:

(a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, or that is presented to a notary, such as, but not limited to, a driver's license, other state-issued ID, or passport; and

(b) The original Statement of Educational Purpose provided below, which must be notarized. If the notary statement appears on a separate page than the Statement of Educational Purpose, there must be a clear indication that the Statement of Educational Purpose was the document notarized.

### Statement of Educational Purpose

I certify that \_\_\_\_\_ I, am the individual signing this Statement of Educational  
Student Name

Purpose and that the Federal student financial assistance I may receive will only be used for educational purposes and to pay the cost

of attending \_\_\_\_\_ for 2022 – 2023.  
Name of Institution

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student ID Number

### Verificación de Identidad y Declaración de Propósito Educativo para ser firmada en presencia de un notario

Si el estudiante no es capaz de comparecer en persona en CSUMB para verificar su identidad, el mismo debe proporcionar a la institución:

(a) una copia de la de identificación con fotografía (ID) válida emitida por el gobierno que no haya expirado, que se reconoce en la declaración del notario que aparece a continuación, o que se presenta ante un notario, como una licencia de conducir, otro tipo de identificación emitida por el estado o pasaporte, entre otros; y

(b) la Declaración de Propósito Educativo original proporcionada a continuación debe ser notarizada. Si la declaración del notario aparece en una página separada de la Declaración de Propósito Educativo, se debe indicar de manera clara que la Declaración de Propósito Educativo era el documento notarizado.

### Declaración de Propósito Educativo

Certificó que yo, \_\_\_\_\_ soy el individuo que firma esta Declaración de Propósito  
Imprimir nombre del estudiante

Educativo, y que la ayuda financiera federal estudiantil que yo pueda recibir sólo será utilizada para fines educativos y para pagar el

costo de asistir \_\_\_\_\_ a para 2022–2023.  
Imprimir nombre de institución educativa postsecundaria

\_\_\_\_\_  
Firma del estudiante

\_\_\_\_\_  
Fecha

\_\_\_\_\_  
Número de identificación del estudiante

Student Last Name	Student First Name	OASIS Student ID
-------------------	--------------------	------------------

## Notary Certificate of Acknowledgement

State of \_\_\_\_\_

City of \_\_\_\_\_

County of \_\_\_\_\_

On \_\_\_\_\_

Before me, \_\_\_\_\_, \_\_\_\_\_  
Notary's Name Student Name

personally appeared and proved to me on the basis of satisfactory evidence of identification \_\_\_\_\_  
Type of unexpired government issued photo ID

to be above named person who signed the foregoing instrument.

**Witness my hand and official seal:**

Seal:

\_\_\_\_\_  
Notary Signature

**My commission expires on** \_\_\_\_\_  
Date

## Review & Sign

Each person signing below certifies that all of the information reported is complete and correct. The student and one parent whose information was reported on the FAFSA must sign and date. **WARNING:** If you purposely give false or misleading information, you may be fined, sent to prison, or both.

\_\_\_\_\_  
**Student Signature (Required)** **Date** **Student Phone # with voicemail**

\_\_\_\_\_  
**Spouse Signature (Required, if married)** **Date**